Solicitation / Request For Quote Process

Priorities for Use of Government Supply Sources Supplies

- Agency inventories;
- Excess from other agencies (see Subpart 8.1);
- Federal Prison Industries, Inc. (see Subpart 8.6);
- Products available from the Committee for Purchase From People Who Are Blind or Severely Disabled (see Subpart 8.7);
- Wholesale supply sources, such as stock programs of the General Services Administration (GSA) (see 41 CFR 101-26.3), the Defense Logistics Agency (see 41 CFR 101-26.6), the Department of Veterans Affairs (see 41 CFR 101-26.704), and military inventory control points;
- Optional use Federal Supply Schedules (see Subpart 8.4); and
- Commercial sources (including educational and nonprofit institutions).
- Ref: FAR 8.002(a)(1)

Priorities for Use of Government Supply Sources
Services

- Services available from the Committee for Purchase From People Who Are Blind or Severely Disabled (see Subpart 8.7);
- Mandatory Federal Supply Schedules (see Subpart 8.4);
- Optional use Federal Supply Schedules (see Subpart 8.4); and
- Federal Prison Industries, Inc. (see Subpart 8.6), or commercial sources (including educational and nonprofit institutions).

USE EXISTING CONTRACTS FIRST!

- GSA Schedule
  - https://www.gsaadvantage.gov/advgsa/main_pages/start_page.jsp
- FAST
  - http://fast.hill.af.mil/
- ConConnect
  - https://www.afmc-mil.wpafb.af.mil/organizations/HQ-AFMC/PK/connect.htm
- Existing ID/IQ and Requirements contracts

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https://www.gsaadvantage.gov/advgsa/main_pages/start_page.jsp

GSA * Advantage! * Security * What's New * e-Buy * e-Library * Customer Service * Help/FAQ

SA Advantage!

...Working for the U.S. Government

Login:

ser ID

assword

Go!

orgot Your User ID or assword?

et your User ID and assword - Register Here.

Welcome to GSA Advantage!

GSA Advantage! is the Federal Government's premier online shopping site. With millions of products and services, GSA Advantage! provides a one stop shopping source to meet all your procurement needs.

5 ways to shop Advantage! now

1. Search/Browse

Advanced Search Go!

2. Quick Order

ter NSN

Enter Quantity

Go!

3. Re-Order from a Previous Order Go!

4. FEDSTRIP/MILSTRIP Go!

View a Tutorial of the "new" GSA Advantage!

Requisition Status

Shop Advantage! for:

* *Advantage!* will custom tailor information based on your interests, purchases and visits.
* *Advantage!* will remember your parked carts and cart numbers, so you won't have to.
* You can Add/Modify/Delete multiple payment methods

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http://fast.hill.af.mil/

U.S. AIR FORCE

ALC Points of Contact

FAST Primes e-mail Points of Contact

FAST Primes & Subcontractors Listing

Business Planning Guide (ID/IQ Orders)

FAST User's Guide & Each ALC's Addendum

Integrated Digital Environment

FAST SOW 1 Aug 2000

FAST Documents Folder

FAST

Flexible Acquisition and Sustainment Tool

Air Force Material Command
Air Logistics Centers
Teaming Together to Quickly
Solve Air Force Weapon Systems
Sustainment Challenges

FAST Lead Program Office
Warner Robins Air Logistics Center
Space & Special System Management Directorate
Comm: (478) 926-0873
DSN: 468-0873

Please Read This Security and Privacy Notice

Send questions or comments by email to
FAST Technical Administrators

Edit View Favorites Tools Help
Back Search Favorites Media
https://www.afmc-mil.wpafb.af.mil/organizations/HQ-AFMC/PK/connect.htm

Welcome

Contract Connection (ConConnect)

- What is this Web Site?
  - Roadshow Briefing (July - August 2000)
- Philosophy and Changing Roles of Acquisition
- **Tools:**
  - Knowledge Areas and Sources
  - ConConnect Decision Tree
  - ConConnect Database
    - ConConnect Database Points of Contact

Simplified Acquisition Procedures
(FAR Part 13)

Acquisition of supplies and services, including construction, research and development, and commercial items, the aggregate amount of which does not exceed the simplified acquisition threshold. (FAR 13.0)

Simplified Acquisition Procedures

- May be used for purchases that exceed the Micropurchase threshold :
  - $2,000 for Construction, or
  - $2,500 for all other supplies or services, **but**
- But do not exceed the Simplified Acquisition Threshold (SAT) - $100,000
(except in support of Contingency Operations - $200,000)

- For acquisitions of **commercial items** exceeding the simplified acquisition threshold but not exceeding $5,000,000, including options.

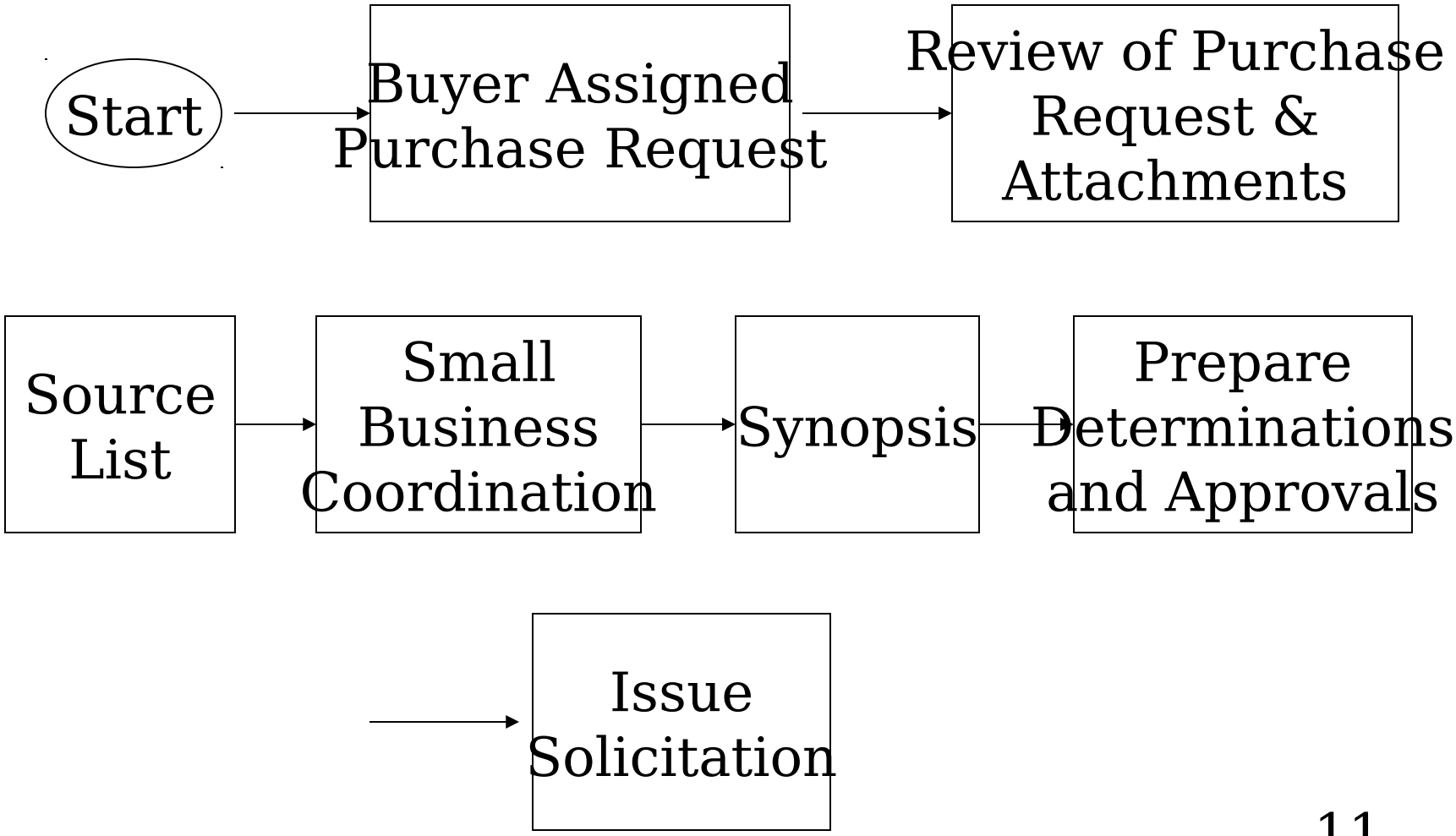
(FAR 13.003)

Purpose of Simplified Acquisition Procedures (FAR Part 13)

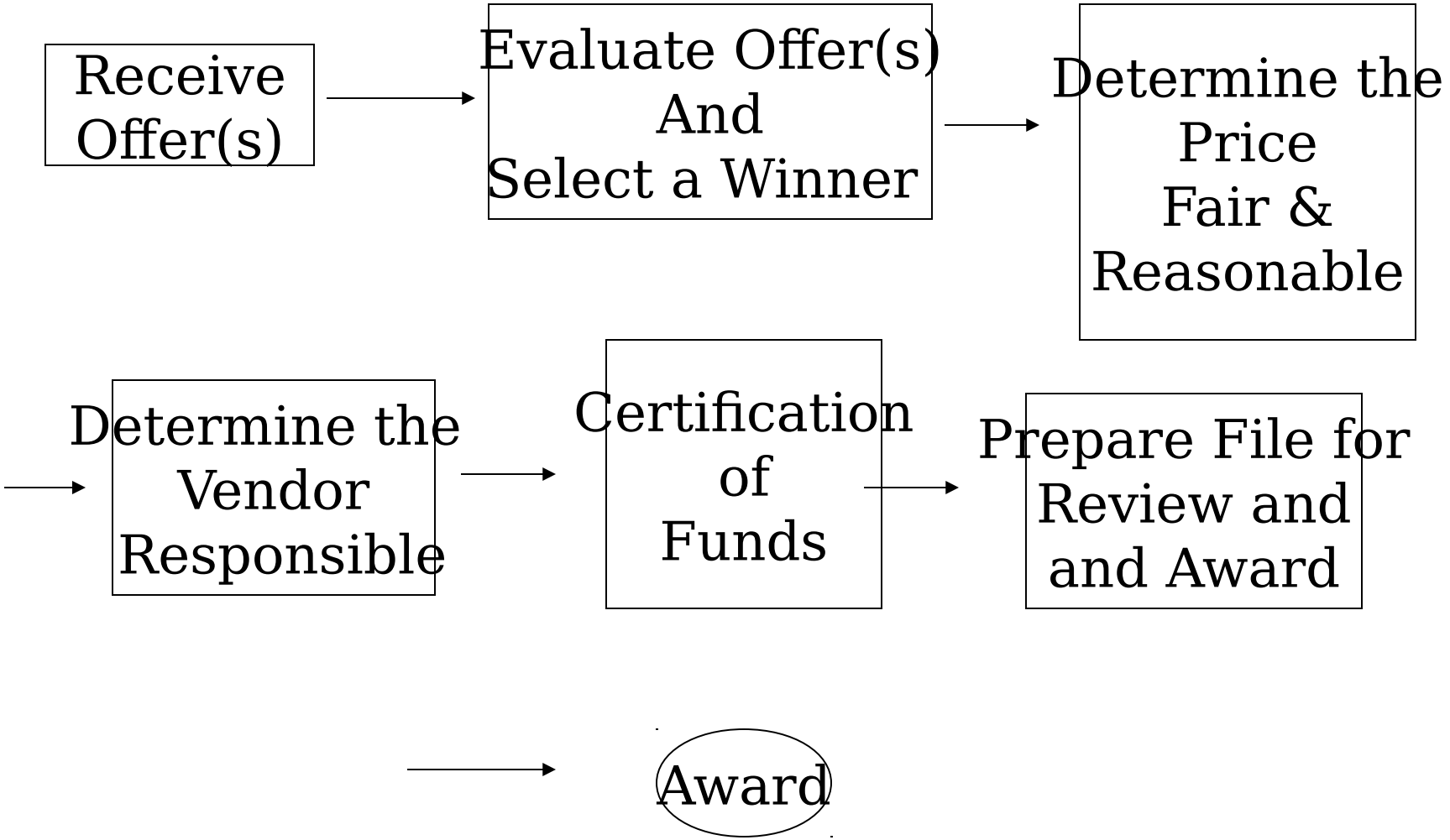
- Reduce Administrative Costs
- Improve Opportunities for Small, Small Disadvantaged, and Women-Owned Small Business
- Promote Efficiency and Economy in Contracting
- Avoid Unnecessary Burdens for Agencies and Contractors

(FAR 13.002)

Solicitation/Request for Quote Process



Solicitation/Request for Quote Process


Receive Offer(s)
Evaluate Offer(s) And Select a Winner
Determine the Price Fair & Reasonable
Prepare File for Review and and Award
Certification of Funds
Determine the Vendor Responsible
Award

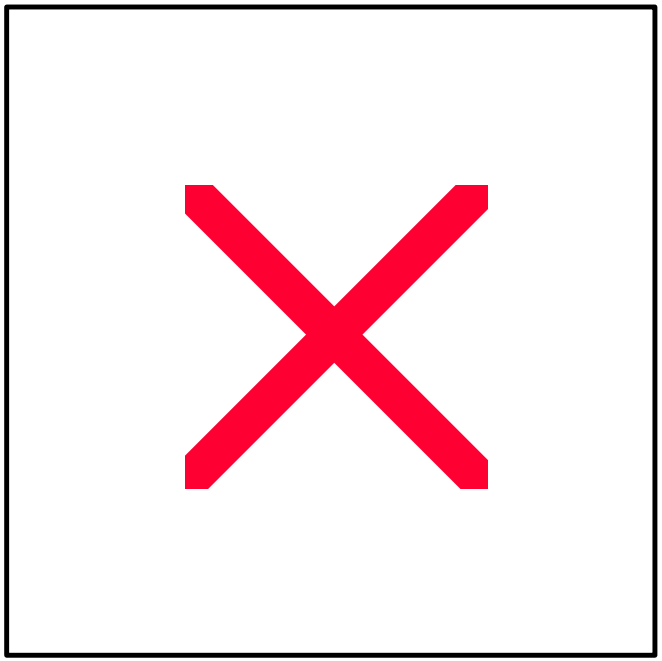
The Purchase Request Package

Purchase Request (AF Form 9, AFMC Form 36, etc)

Attachments:

- Quality (AFMC Form 807)
- Transportation (DD Form 1653)
- Packaging and Marking (SPI) (AFMC Form 158)
- Screening Analysis Worksheet (AFMC Form 761)
- Sole Source Justification
- Security (DD Form 254)
- Ozone Depleting Statement
- Statement of Work / Statement of Objective
- Data Requirements List (DD Form 1423)
- History Sheet
- Engineering Data Lists (AFMC Form 762)

Cycle Standards



(Hint: Click the X)

J041 CYCLE MILESTONES

- 00 PR RECEIPT (PK STAMP)
- 01 ASSIGN BUYER
- 02 ASSIGN CYCLE
- 07 REQUEST CONTRACT
- 11 DISTRIBUTE AWARD

Dropping the “02”

- For Central buyers:
  - Send an email to WRALC/PK PKXO
  - Request that the “02” be dropped and indicate:
    - PR Number
    - Your Buyer Code
    - Cycle Code Assigned

PR RE-WORK = Wasted Effort

- PR PACKAGE INCOMPLETE
  - NOTIFY IM
  - ALLOW 2 DAYS TO CORRECT
- IF CORRECTIONS NOT MADE
  - RETURN PR OR
  - CHECK YOUR DIVISION POLICY

EXCEPTION REASON CODES (ERCs)

- AFMC MANUAL 64-104 VOL 1 Table A4.19.
- https://www.afmc-mil.wpafb.af.mil/pdl/afmc/man/64series/64_104v1/64-104v1.pdf
- RE-AGING ERCS
  - 82,83,84,85 & 8J
  - STOP THE CLOCK
  - RE-AGE THE PR ONCE CORRECTED
- CHECK YOUR DIVISION POLICY FOR REWORK GUIDANCE
  - FORMS
  - APPROVALS

Sole Source or Competitive

- Sole Source Justification

  - Value is over micropurchase threshold but under Simplified Acquisition Threshold

  - “L” Coded items require a Sole Source Justification

  -Items that have a current AFMC Form 761 and have been screened do not require a separate Sole Source Justification.

- Urgent Justification
- Acquisition Method Code (AFMC Form 761)

Small Business Coordination (DD Form 2579)

- Required prior to issuing your solicitation or contract modification
- The contracting officer **must**, to the extent practicable, encourage **maximum participation** by
  - small business,
  - veteran-owned small business,
  - service-disabled veteran-owned small business,
  - HUBZone small business,
  - small disadvantaged business, and
  - women-owned small business
- Documents to send with coordination :

  Everything that explains your circumstances.

Small Business Coordination (DD Form 2579)

- Required for Sole Source AND Competitive
- Threshold

-- ALL requirements GREATER than $10,000

- Sample completed DD Form 2579

Each Acquisition of Supplies or Services that has an anticipated dollar value exceeding $2,500 and not exceeding $100,000 is reserved exclusively for small business concerns and shall be set aside.

(FAR 13.003)

Soliciting Competition

- Nature of the Article / Service
  - highly competitive / noncompetitive
- Information obtained from recent buys
- Urgency
- Dollar Value (Over the Micropurchase Threshold)

(FAR 13.106-1)

Source List

- AFMC 761 Added Sources
- History File Sources
- Market Research
- Small Business (BC) Added Sources
  - 8A
  - Small Business Set-Aside
  - HUBZONE
- Foreign Disclosure Review / Export Controls

Synopsis of Proposed Contract Actions (FAR 5.2):

- FedBizOpps is the public notification media by which the DoD identify proposed contracts actions and contract awards.
- Proposed contract actions expected to exceed $25,000 need to be synopsized, but there are exceptions.
- The number of days a synopsis must be published on FedBizOps prior to issuance of a solicitation varies with the nature of the buy and its complexity.

The primary purpose of synopsis is to improve small business access to acquisition information and enhance competition by identifying contracting and subcontracting opportunities.

Synopsis

- There are exceptions to the requirement for Synopsis such as urgency or national security, see FAR 5.202 for a complete listing.
- There is a standard format for Synopsis, see FAR 5.207
- Numbered notes are used in Synopsis http://cbdnet.gpo.gov/num-note.html
- Local Numbered Notes are also used.

Solicitation Face Page

- Assignment of Request for Quote (RFQ) Number
- Contractor and Government Entity Code (CAGE)
- Surveillance Criticality Designator (SCD) (FAR 42.1105)
- Defense Priority Allocation System Rating (DPAS) (FAR 11.6)
- North American Classification System (NAICS)

Schedule of Supplies / Services

- Line Item Numbering
- National Stock Number (NSN)
- Part Number
- Application
- Quantity
- Unit of Issue
- Inspection and Acceptance
- FOB Origin / Destination
- Delivery
- Variation in quantity
- Shipping Instructions
- Foreign Military Sales (FMS)

DCMA Business Rule Changes

Effective 1 Oct 2003: No Government source inspection on contracts under $250K *unless* approved one level above PCO *and* there are significant technical requirements *and* critical product features have been identified *and* the contract is awarded to OEM/producer.

Ref:

OUSD (AT&L) Memo, Changes in Acquisition Business Rules, 14 April 2003

FOB Destination

Means “Free On Board” at Destination; i.e., the seller or consignor delivers the goods on the seller’s or consignor’s conveyance at destination. Unless the contract provides otherwise, cost of shipping and risk of loss are borne by the seller or consignor.

(FAR 47.001)

FOB Origin

Means “Free On Board” at Origin; i.e., the seller or consignor places the goods on the conveyance by which they are to be transported. Unless the contract provides otherwise, cost of shipping and risk of loss are borne by the buyer or consignee.

(FAR 47.001)

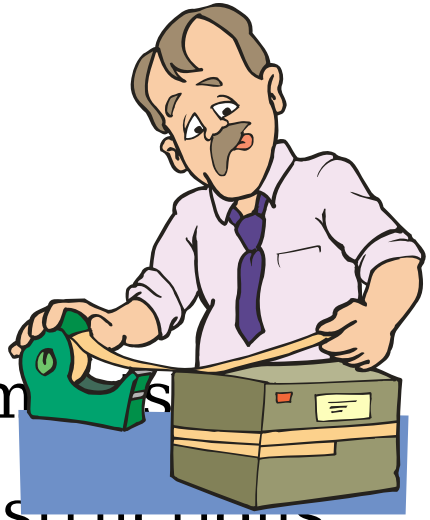
Inspection and Acceptance

Inspection: Examining and testing supplies or services to determine whether they conform to contract requirements.

Acceptance: Means the act of an authorized representative of the Government by which the Government, for itself or as an agent of another, assumes ownership of existing identified supplies tendered or approves specific services rendered as partial or complete performance of the contract.

(FAR 46.101)

Packaging



- AFMC Form 158 Packaging Requirements
- DD Form 2169 Special Packaging Instructions
- Military Packaging vs. Commercial
  - FAR 211.272 states, "Use the provision at 252.211-7004, Alternate Preservation, Packaging, and Packing, in solicitations which include military preservation, packaging, or packing specifications when it is feasible to evaluate and award using commercial or industrial preservation, packaging, or packing."

Unique Item Identification (UID

- The clause 252.211-7003, Item Identification and Valuation requires:
  - (a) DoD unique item identification, or a DoD recognized unique identification equivalent, is required for-
    - (1) All items for which the Government's unit acquisition cost is $5,000 or more;
    - (2) Items for which the Government's unit acquisition cost is less than $5,000, when determined necessary by the requiring activity for serially managed, mission essential, or controlled inventory equipment, repairable items, or consumable items or material; and

Quality

- AFMC Form 807 - Quality (dtd 20030731)
- Clauses
  - Standard Inspection
  - Contractor Responsibility
  - Mandatory Government Inspection
  - Higher Level Contractor Quality
  - Certificate of Conformance
  - Commercial Item Inspection

Transportation

- DD Form 1653 - Transportation Data for Solicitations

- Clauses

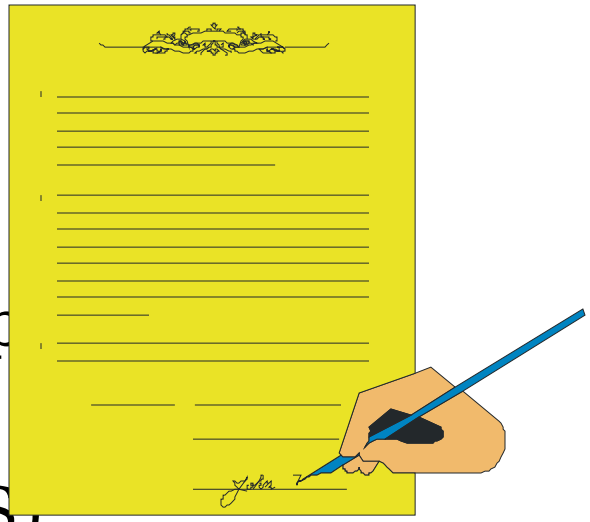
Accounting Data

- Accounting Classification Reference Number (ACRN)
- “G” Clauses

Clauses and Provisions

- Clauses are applicable based upon the requirement

- Examples
  - Ozone Depleting
  - Hazardous Material
  - Government Furnished Prop
  - Classified
  - Foreign Military Sales (FMS)
  - Options



Legal Effect of Quotations

- Quotation is not an offer
- Quotation cannot be accepted by the Government to form a binding contract
- Issuance of an Order in response to a supplier's quotation does not establish a contract
- The order is an offer by the Government to the Supplier to buy certain supplies or services upon specified terms and conditions
- A contract is established when the Supplier accepts the offer

(FAR 13.004)

Request For Quote Samples

(1) Spares

(2) Engineering Services

(3) Repairs

(4) First Article RFQ / Award

(5) Commercial Orders

(6) Solicitation Synopsis

(7) Oral Solicitations

(8) Letter Request For Quote

(9) Purchase Order With Option

(10) Unpriced Order

Combined Solicitations/Synopsis (FAR 12.603)

- Used for **Commercial Items Only**
- Combines the Synopsis required by 5.203 and the issuance of the solicitation into a single document
- Only appropriate where the solicitation is relatively simple
- Written solicitation is not issued
- Not necessary to publish a separate synopsis

Oral Solicitations
(FAR 13.106-1)

- Contracting officers shall solicit quotations orally to the maximum extent practicable if the acquisition does not exceed the simplified acquisition threshold. HOWEVER, use of oral solicitations over $25,000 is highly restricted:
  - Posting to Government Point of Entry (GPE) which is FedBizOps is required for all solicitation, unless an exemption applies.
  - See FAR 5.101 and FAR 5.202.
- The contracting office should establish and maintain records of oral price quotations in order to reflect clearly the propriety of placing the order at the price paid with the supplier concerned.

Other Topics:

- Best Value / Past Performance
- Options
  - Definition
  - Sample Purchase Order
  - Determination to Include
  - Determination to Exercise
- Undefinitized (Unpriced Purchase Order)
- Electronic Solicitations
  - Criteria For Posting to the Government Point of Entry

PR Amendments

- When the requirement changes a PR amendment **must** be provided by the PR initiator.
- Examples:
  - Change of quantity
  - Change of NSN
  - Change of Statement of Work
  - Changes in the data requirements
  - Addition or deletion of Options

Options
(FAR 17.2):

A unilateral right in a contract by which, for a specified time, the Government may elect to purchase additional supplies or services called for by the contract, or may elect to extend the term of the contract.

Options

Aggregate threshold cannot exceed the Simplified Acquisition Threshold.

The Contracting Officer shall not employ options if:

- The contractor will incur undue risks; e.g. the price or availability of necessary materials or labor is not reasonably foreseeable
- Market prices for supplies or services involved are likely to change substantially
- The option represents known firm requirements for which funds are available unless (1) the basic quantity is a learning or testing quantity and (2) competition for the option is impracticable once the initial contract is awarded

Documentation to include Option
(FAR 17.205)

- The contracting officer shall justify in writing the quantities or the term under option, the notification period for exercising the option, and any limitation on option price under 17.203(g); and shall include the justification document in the contract file.
- Any justifications and approvals and any determination and findings required by Part 6 shall specify both the basic requirement and the increase permitted by the option.

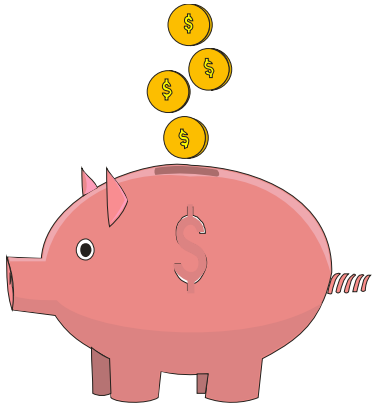
Determination to Exercise an Option (FAR 17.207):

The contracting officer may exercise an option only after determining that:

- Funds are available
- The requirements covered by the option fulfills an existing Government need
- The exercise of the option is the most advantageous method of fulfilling the Government's need, price and other factors considered; and
- The option was synopsized in accordance with FAR Part 5 unless exempted by 5.202(a)(11) or other appropriate exemptions in 5.202.

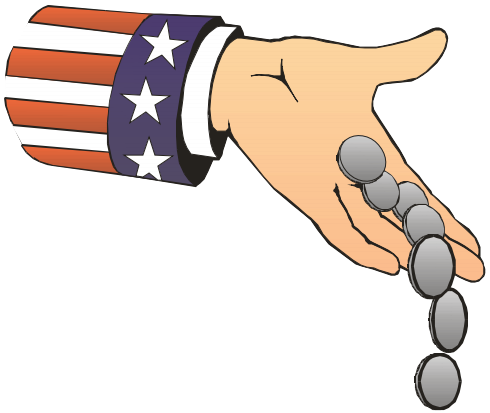
Best Value/Past Performance (FAR 13.106-2):

- **Quotations and offers shall be evaluated on the basis established in the solicitation**
- The contracting officer has broad discretion in fashioning suitable evaluation procedures
- At the contracting officer's discretion, one or more, but not necessarily all, of the evaluation procedures in FAR Part 14 or 15 may be used



Best Value/Past Performance

- If using Price and other factors, ensure that quotations or offers can be evaluated in an efficient and minimally burdensome fashion
- Formal evaluation plans and establishing a competitive range, conducting discussions, and scoring quotations or offers are not required



Past Performance

- Does not require the creation or existence of a formal data base
- May be based on information such as the contracting officer's knowledge of and previous experience with the supply or service being acquired, customer surveys, or

  other reasonable basis
- Red-Yellow-Green Evaluations
  - FAR 5315.209-90(g). The contracting officer shall insert the provision at 5352.215-9018, Additional Evaluation Factor for Consideration of Past Performance – Red-Yellow-Green Program (Equal to or Less Than $100K), in Section M for competitive spares solicitations equal to or less than $100K, subject to the Red-Yellow-Green (RYG) Program. If any factor other than price and adjusted price based on the RYG program ratings are to be used, those factors must be stated in Section M.

Unpriced Purchase Orders - **FAR 13.302-2**

- An unpriced purchase order is an order for supplies or services, the price of which is not established at the time of issuance of the order.
- An unpriced purchase order may be used only when --
  - It is impractical to obtain pricing in advance of issuance of the purchase order; and
  - The purchase is for --
    - Repairs to equipment requiring disassembly to determine the nature and extent of repairs;
    - Material available from only one source and for which cost cannot readily be established; or
    - Supplies or services for which prices are known to be competitive, but exact prices are not known (*e.g.*, miscellaneous repair parts, maintenance agreements).
- A realistic monetary limitation, either for each line item or for the total order, shall be placed on each unpriced purchase order
- The contracting officer shall follow up on each order to ensure timely pricing

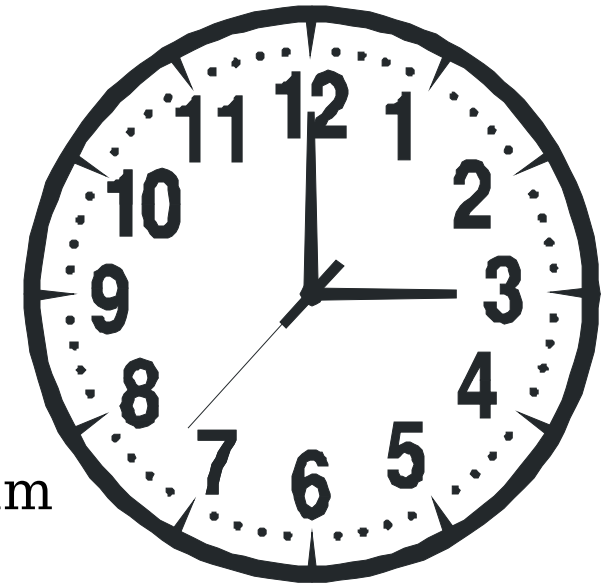
Electronic Solicitations

- Paper is so old fashioned.
- Post solicitations for requirements over $10,000 to FedBizOpps, unless an exemption applies.

Managing My Workload

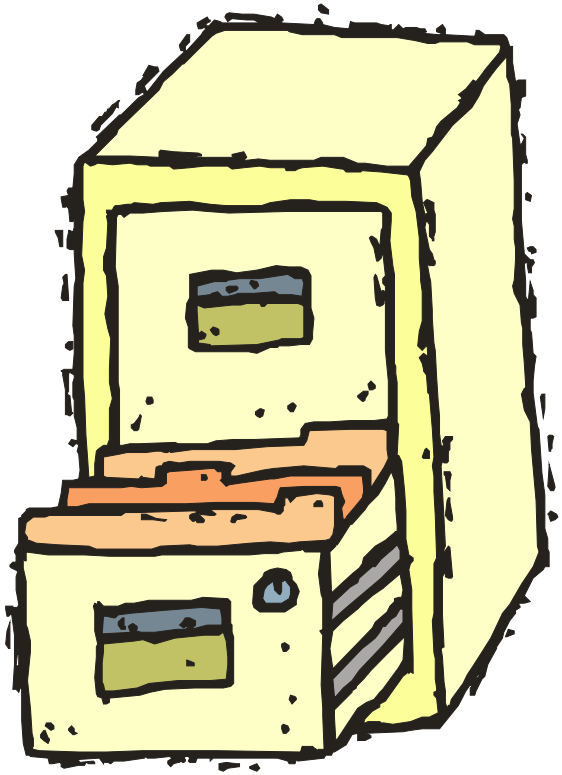
How Can I Organize / Manage My Desk?

- How do I keep up with my Desk?
- How to keep track of:
  - New Purchase Requests
  - Small Business Coordination
  - Awaiting Quotes
  - Evaluating Quotes
  - Price Negotiation Memorandum
  - Contract Preparation



How Can I Organize / Manage My Desk?

- Daily Review of each File?
- Notes to YOURSELF or what is the next thing I have to do.
- Get Organized!



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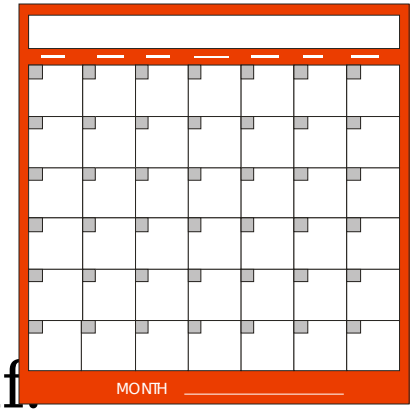

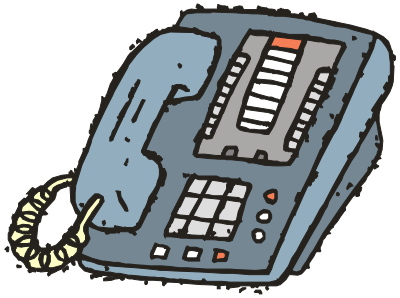

- Calendar Of Activities
- Daily “To Do” List
- Sticky Notes to yourself.
- Use Folders
- Label Folders
- Arrange folders with some sort of logic that **someone else can figure out**.

Don’t Loose track of what is going on with EACH FILE
because you have gotten distracted by something else!

Helpful Hints

- Reviewer's Checklist
- Simplified Acquisition (SAP) Checklist
- Go to the PK Home Page and Select Policy and Review to find these checklists.
- http://pkec.robins.af.mil/pr/pkpb.htm